weedmaps®

Getting Started with Pickup Orders

Version Number: 0.9

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Welcome!

Thanks for being a Weedmaps Logistics customer. We're excited to partner with you to help you grow your business. This guide walks you through how to:

1. View a new pickup order.
2. Update the status of a pickup order.
3. Complete a pickup order after the customer/patient has received their order.
4. Cancel a pickup order.
5. Search for a pickup order.
6. View all orders.

This guide is intended for the person at your business who manages online pickup orders.

Requirements

Before you can access pickup orders, you must have a *WM Business* account and the proper login credentials.

Browser

Google Chrome™ and Safari®: *WM Business* is designed to work with the current version of Chrome and Safari browsers.

Hardware

WM Business is designed to work on desktops, laptops, and tablets.

Other

An internet connection is required to process pickup orders.

Definitions

Listing ID Number (WMID) – A unique identification (ID) number assigned by Weedmaps that corresponds to each listing's personalized marketing page displayed across all Weedmaps platforms. A business serving multiple locations may have more than one listing, but must designate a primary parent listing, with all others as subordinate child listings. Any subordinate child listings must use the WMID of the primary parent listing.

Pickup Order – A type of online order where customers/patients travel to a storefront dispensary location to pick up the items they have purchased.

Product – Any type of cannabis good (e.g., extracts, topicals, flowers).

Region – A geographical area where your Listing serves patients and customers. Your regions typically include areas serviced by your deliveries or where your dispensary storefronts are located.

Team – The employees at your business/dispensary who gather the products for customers/patients' pickup orders.

WM Business – The area of the Weedmaps website where the Listing Owners can manage their account, deals, listings, menu items, and online orders.

Overview: Pickup Orders Card

The pickup orders card shows the customer/patient's information, the customer/patient's order, any relevant notes from the customer/patient in regard to their pickup order, and the total price of the sale. The pickup order card cannot be edited. Refer to the pickup order card below for details.

Appendix A: Pickup Order Card

1. **Print** – Print the pickup order card.
2. **Pickup Status** – The current status of the pickup order.
3. **Order ID Number** – The ID number for this particular pickup order.
4. **Customer Information** – The customer/patient's information as provided by them.
5. **Customer Notes** – Notes for the pickup order provided by the customer/patient, if any.
6. **Identification** – Medical Recommendation and Identification cards uploaded by the customer/patient.
7. **Pickup Order** – The products the customer/patient ordered.
8. **Total** – Taxes and the total price of the order.
9. **Cancel** – Cancels the pickup order.
10. **Complete** – Completes the pickup order after the customer/patient has picked up their order.

Accessing Your Pickup Orders

The first time you log in and toggle to enable pickup orders, you're guided through the migration process. You'll need to create teams of employees.

The *Pickup* page gives you full control of the pickup orders your business receives. From here, you can:

- See real-time progress of each pickup order.
- Search for pickup order information.
- Sort pickup orders by time.
- Move pickup order cards to each stage in the process.
- Print a specific pickup order.
- Cancel pickup orders.
- View customer/patient information in each pickup order.
- Complete your pickup orders.

Overview: Pickup Page

The *Pickup* page provides an overview of all your current pickup orders, organized by status. Refer to the below for details.
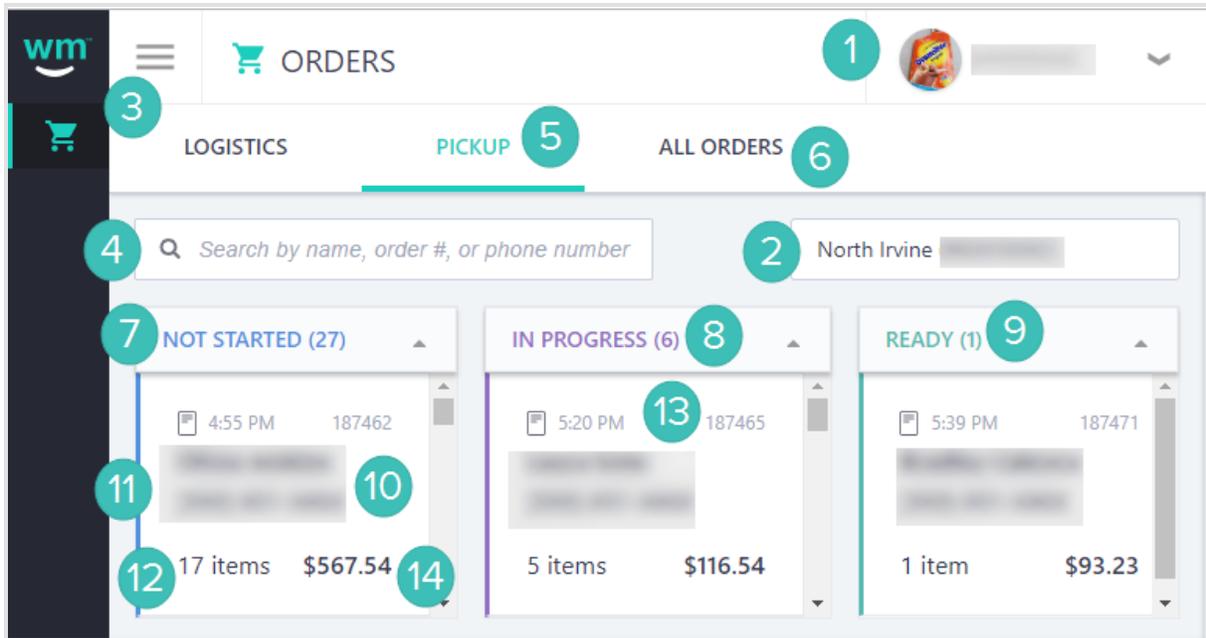
Appendix B: Pickup Page

1. **User menu** – A quick way to access your account.
2. **Location** – The current region where these orders are taking place.
3. **Menu** – Access to the menu.
4. **Search** – Search orders by entering a name, order number, or phone number.
5. **Pickup** – Access the *Pickup* web page.
6. **Orders** – Access the *Orders* web page.
7. **Not Started column** – Cards enter this column when they are newly created.
8. **In Progress column** – When the order is being worked on by a team, the card is moved to the **In Progress** column.
9. **Ready column** – When the order is ready for pickup, it's moved to the **Ready** column.
10. **Pickup Order Card** – Contains the order, customer/patient's information, total items requested, order ID number, and total price.
11. **Customer/Patient Information** – Displays the customer/patient's name and phone number for that order.
12. **Item** – Displayed the total number of items ordered.
13. **Order ID Number** – A unique ID number for a particular order. No two order ID numbers are alike.
14. **Total** – The total amount of money for the order.

Completing a Pickup Order

Completing a pickup order is fast and efficient. When a customer/patient creates a new pickup order, a pickup order card is automatically created in the **Not Started** column. Each time the pickup order card is moved, the following happens:

- The status is changed.
- A notification appears on your screen.
- The customer/patient receives a notification with the current status.

As your team begins to fulfill the order, select and drag the card to the **In Progress** column.

Note: In order for your customers/patients to receive a notification that their order is being fulfilled, you must select and drag the card to the **In Progress** column.

When the order has been fulfilled, select and drag the card to the **Ready** column.

Note: In order for your customers/patients to receive a notification that their order is ready for pickup, you must select and drag the card to the **Ready** column.

After the customer/patient has picked up their order, select and drag the card to the **Complete (drag order here)** section.

Note: The pickup order card must follow this workflow to ensure the customer receives the appropriate notification. You cannot skip steps (e.g., a card cannot go from the **Not Started** column to the **Ready** column).

You can also view the pickup order card at any time during the process by simply selecting the card. To close the pickup order card, select **Close**.
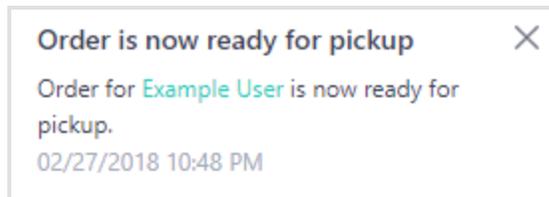
Moving a Pickup Order Card

From the *Pickup* page, move your pickup order card from column to column by performing the following:

1. Under the **Not Started** column, select the pickup order card you're fulfilling the order for and drag it to the **In Progress** column.

> **Order is now in progress** ✕
>
> Order for Example User is now in progress.
> 02/27/2018 10:48 PM
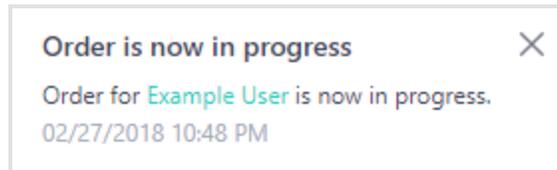
Note: Your customer/patient receives a notification that their order is in the process of being fulfilled.

2. Under the **In Progress** column, select the pickup order card and drag it to the **Ready** column.

> **Order is now ready for pickup** ✕
>
> Order for Example User is now ready for pickup.
> 02/27/2018 10:48 PM

Note: Your customer/patient receives a notification that their order is ready for pickup.

3. Under the **Ready** column, select the pickup order card and drag it to **Complete (drag order here)**.

> **Order is now finished** ✕
>
> Order for Example User is now finished.
> 02/27/2018 10:48 PM
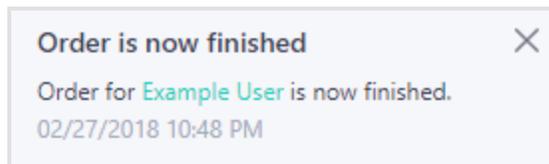
Note: The pickup order card is automatically moved to **Orders**.

Canceling a Pickup Order

Fields with an asterisk are required to be filled out before continuing. To cancel a pickup order, perform the following:

1. Select the pickup order card that you want to cancel.
2. Select **Cancel**.
3. Under **Reason for Canceling**, select the down arrow, and then choose a reason for canceling.
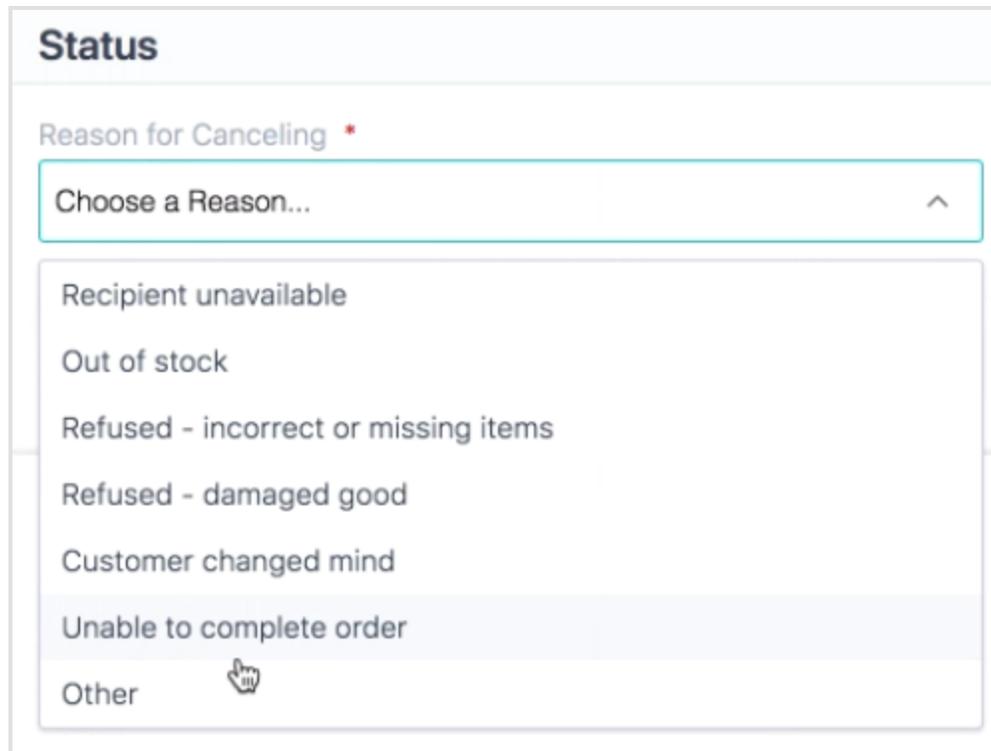
     a. If you chose *Other*, under **Specify Other**, enter a reason for canceling.

4. Select **Cancel Order**.

Note: A notification is sent to the customer/patient that their pickup order is canceled.

Note: A notification appears on the screen that the pickup order is canceled.
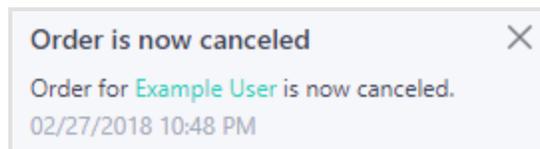
Searching for a Pickup Order

To search for a pickup order, perform the following:

1. Select **Pickup**.
2. In the **Search by name, order #, or phone number** field, enter the name, order number, or phone number of the pickup order you're searching for.

Note: Phone numbers must be typed as they are found on the pickup order card (e.g., **(555) 555-5555**).

Note: The pickup order cards begin displaying as you type.

Viewing Orders

The *Orders* page shows all of your business's orders in one area. This includes pickup and delivery orders. To view all of your orders, perform the following:

1. Select **All Orders**.

Appendix C: Orders Page

2. Select the order, as necessary.

Overview: Order Card

The order card provides information in regard to the customer/patient and their order. The order card cannot be edited. To access the order card, go to **All Orders**. Refer to the overview below for details.
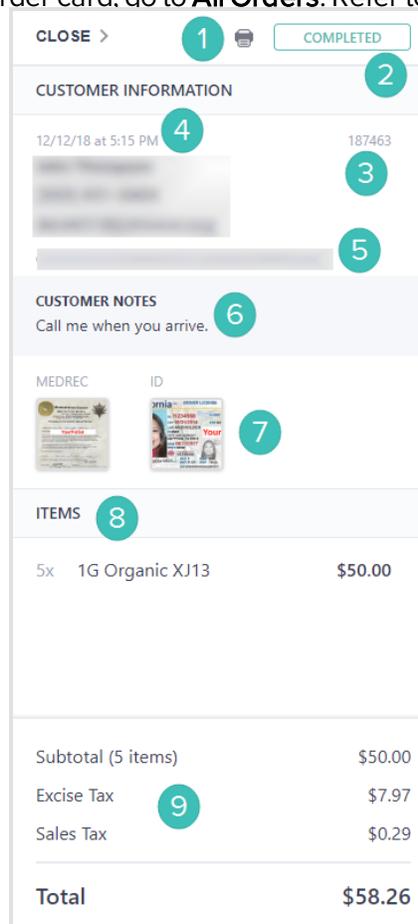
Appendix D: Order Card

1. **Print** – Print the order card.
2. **Pickup Status** – The current status of the order.
3. **Order ID Number** – The ID number for this particular order.
4. **Customer Information** – The customer/patient's information as provided by them.
5. **Storefront and Weedmaps ID number** – The storefront location where the pickup order is taking place and the Weedmaps ID number of that storefront.
6. **Customer Notes** – Notes for the pickup order provided by the customer/patient, if any.
7. **Identification** – Medical Recommendation and Identification cards uploaded by the customer/patient.
8. **Pickup Order** – The products the customer/patient ordered.
9. **Total** – Taxes and total price of the order.

Contacting Support

For any questions you may have about Weedmaps pickup orders, please contact us.

- Call Sales/Support toll-free at 1-844-WEEDMAPS (933-3627)
- Email Sales/Support at CustomerService@weedmaps.com
- Online at https://weedmaps.com/contact

Appendix A: Pickup Order Card

Appendix B: Pickup Page

Appendix C: Orders Page

Appendix D: Order Card

CLOSE ⟩   1   🖨   **COMPLETED**

2

CUSTOMER INFORMATION

4

12/12/18 at 5:15 PM   187463

3

5

CUSTOMER NOTES   6

Call me when you arrive.

MEDREC   ID

7

ITEMS   8

5x   1G Organic XJ13   **$50.00**

Subtotal (5 items) $50.00

Excise Tax   9 $7.97

Sales Tax $0.29

Total   **$58.26**